**Arizona State
Retirement System**

# Ending Payroll Verification
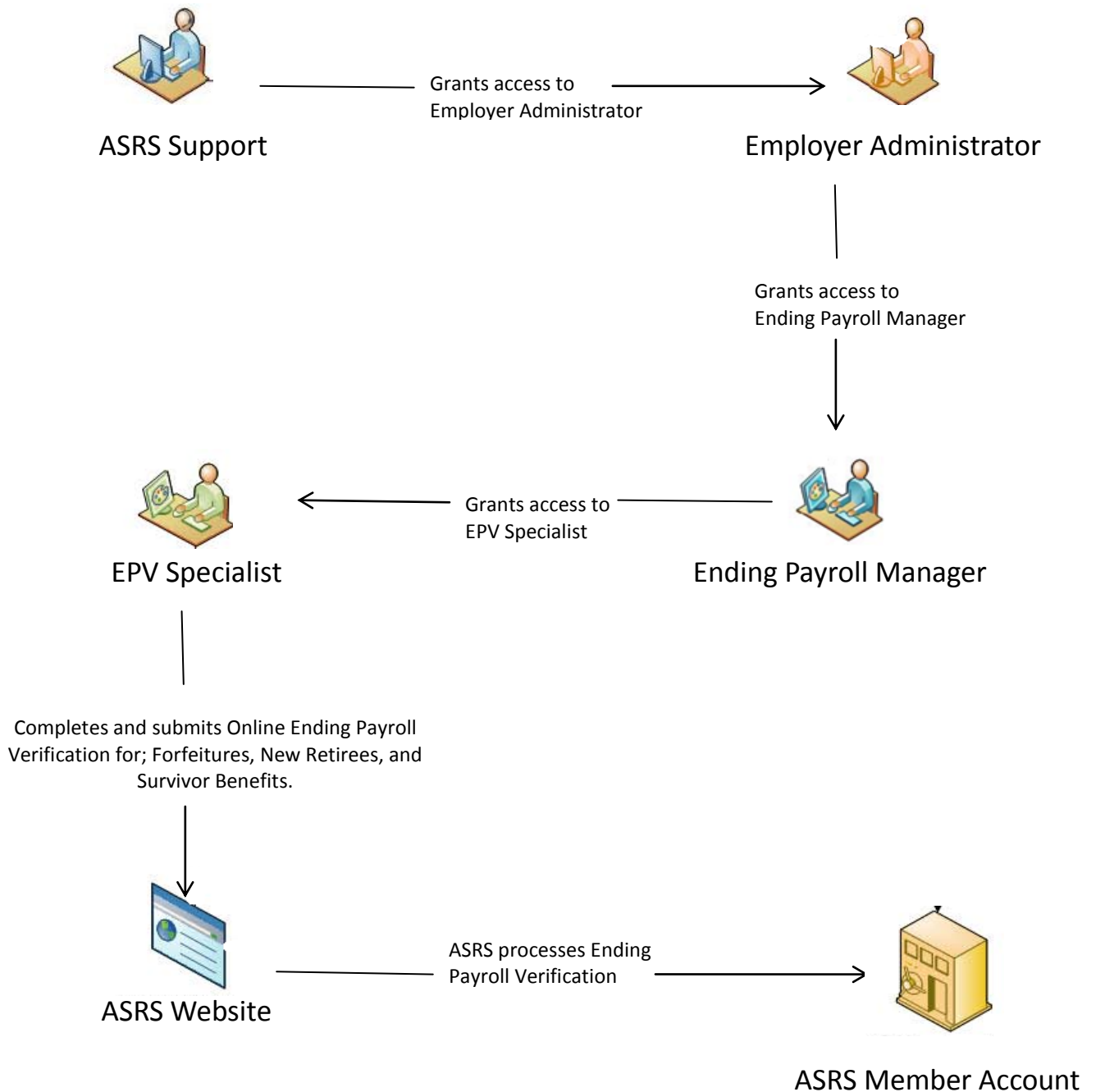
## *Employer User Guide*

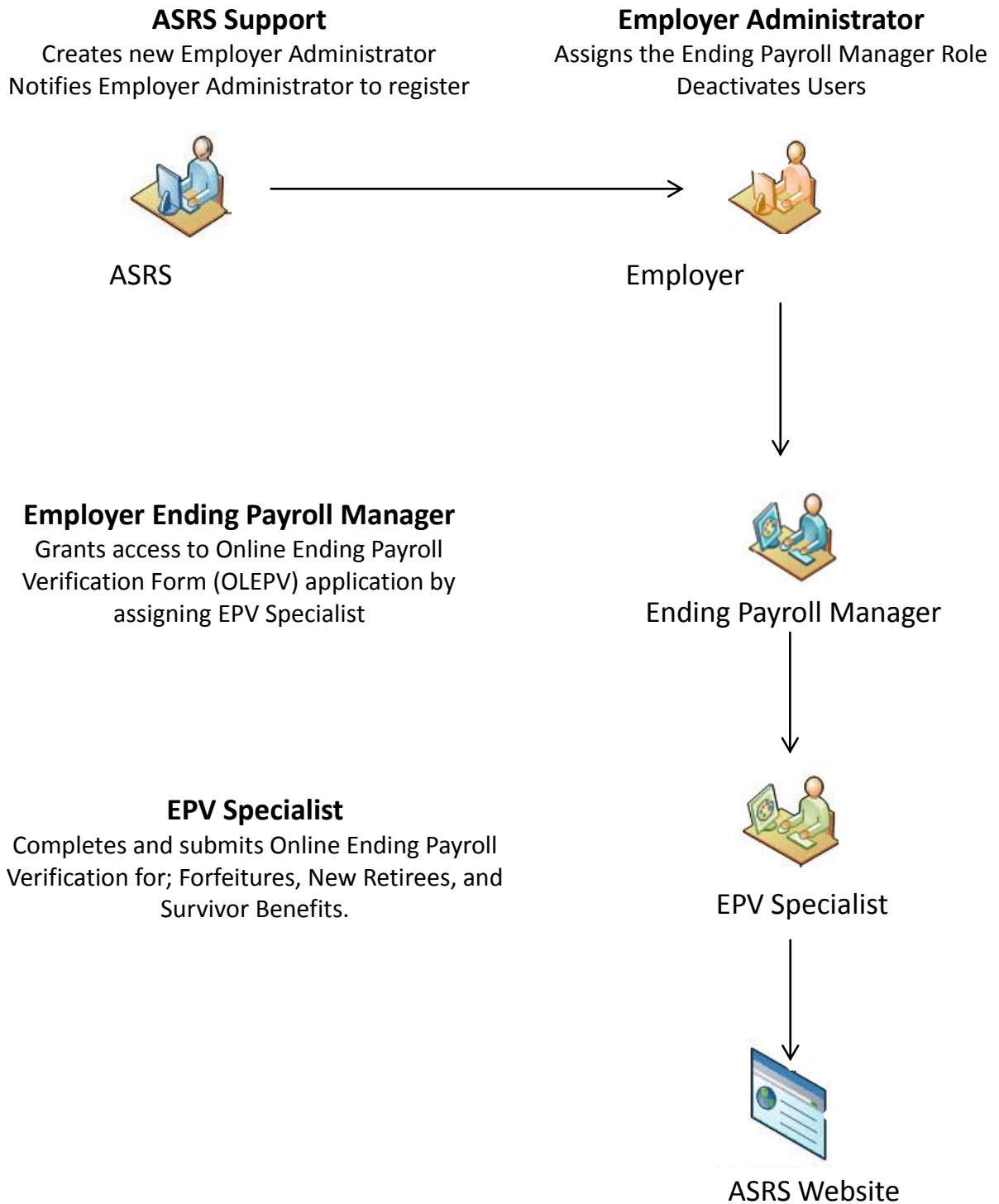# Table of Contents

# Section One:
## Online Ending Payroll Verification (EPV) Process

# Online EPV Process Flow

ASRS Support

Grants access to
Employer Administrator

Employer Administrator

Grants access to
Ending Payroll Manager

EPV Specialist

Grants access to
EPV Specialist

Ending Payroll Manager

Completes and submits Online Ending Payroll
Verification for; Forfeitures, New Retirees, and
Survivor Benefits.

ASRS Website

ASRS processes Ending
Payroll Verification

ASRS Member Account

# Online EPV Administration

**ASRS Support**
Creates new Employer Administrator
Notifies Employer Administrator to register

**Employer Administrator**
Assigns the Ending Payroll Manager Role
Deactivates Users

ASRS

Employer

**Employer Ending Payroll Manager**
Grants access to Online Ending Payroll
Verification Form (OLEPV) application by
assigning EPV Specialist

Ending Payroll Manager

**EPV Specialist**
Completes and submits Online Ending Payroll
Verification for; Forfeitures, New Retirees, and
Survivor Benefits.

EPV Specialist

ASRS Website

# *Section Two:*

# **Getting Started**

# Online EPV Form

The Employer Administrator must designate an Ending Payroll Manager. The Ending Payroll Manager will designate the Ending Payroll Verification Specialist for the ASRS online application.

The first time accessing the Ending Payroll Verification request, the person's title must be entered in Edit My Profile. This is located towards the bottom of the left navigation pane.

There are three types of Ending Payroll Verification forms; New Retirement, Refund, and Survivor Benefit.

# Step 1

EPV Specialist will access employer secure home site at www.azasrs.gov and login.

**Click** on Ending Payroll Verification in the left navigation pane of the home site to view the current and un-submitted EPV's.

# Step 2

**Viewing a Current and Un-Submitted EPV Requests**

### Process Ending Payroll Verification Requests

This page will allow you to verify the termination of employment for the member who requested to either Refund, is a New Retiree or a Survivor Benefit.

📄 Click here to open the Ending Payroll Verification User Guide ◄ ──────────── **User Guide**

[ Show submitted last 6 months ]  ◄ ────── **Click** to see submitted EPV's for the past six months– Click and Go to Step 3

**Current and Unsubmitted Ending Payroll Verifications:**

| Date Requested ▲ | SSN | First Name | Last Name | Status | Date Modified |
|---|---|---|---|---|---|
| 04/06/2012 | 555-25-5555 | Jackie | | OPENED | |
| 04/06/2012 | 545-25-5555 | Becky | | EDITED | 04/09/2012 |
| 04/06/2012 | | Merrill | | OPENED | |
| 04/06/2012 | | David | | OPENED | |
| 04/06/2012 | | Bonny | | OPENED | |
| 04/06/2012 | | Jeffrey | | OPENED | |
| 04/06/2012 | | Suzette | | OPENED | |
| 04/12/2012 | | Elizabeth | | OPENED | |
| 04/12/2012 | | Jeffrey | | OPENED | |
| 04/13/2012 | | Coy | | OPENED | |
| 04/23/2012 | | Christopher | | OPENED | |

**Click** on any line to open an EPV Form- specific EPV form for details.

See Status Definitions below

Status Definitions:

    **New**      Has not been opened.

    **Opened**      Has been viewed, but no changes have been saved.

    **Edited**      Has been viewed, changes saved, not submitted to ASRS.

# Step 3

## Submitted within the last 6 months EPV Requests

**Process Ending Payroll Verification Requests**

This page will allow you to verify the termination of employment for the member who requested to either Refund, is a New Retiree or a Survivor Benefit.

📄 Click here to open the Ending Payroll Verification User Guide

| Show current requests |

**No Ending Payroll Verifications submitted in the last 6 months**

| SSN | First Name | Last Name | Original Submitted Date ▼ | Last Resubmission Date | Status |
|-----|-----------|-----------|--------------------------|------------------------|--------|
| 555-25-5555 | Frederick | | 04/23/2012 | | SUBMITTED |
| 545-25-5555 | Elizabeth | | 04/09/2012 | | EDITED |
| | Sonya | | 04/09/2012 | | EDITED |
| | Nan | | 04/09/2012 | | SUBMITTED |
| | Edward | | 04/09/2012 | | EDITED |
| | Christopher | | 04/09/2012 | | SUBMITTED |
| | Petra | | 04/09/2012 | | SUBMITTED |
| | Carolyn | | 04/09/2012 | | SUBMITTED |
| | Bernadette | | 04/09/2012 | | SUBMITTED |
| | Wendy | | 04/09/2012 | | EDITED |
| | Jael | | 04/09/2012 | | SUBMITTED |
| | Kenneth | | 04/09/2012 | | SUBMITTED |
| | Larry | | 04/09/2012 | 04/09/2012 | RESUBMITTED |

**User Guide**

**Click** to see current and un-submitted EPV's for the past six months– Click and Go to Step 2

**Click** on any line to open the EPV Form- Go to required EPV.

See Status Definitions below

To update status press F5 or use refresh on your browser.

Status Definitions:

**Submitted**     Has not been re-opened, edited or re-submitted

**Edited**     Is a previously submitted form that has been re-opened, changes saved, not submitted to ASRS.

**Resubmitted**     Has been viewed, changes saved, not submitted to ASRS

Once the Ending Payroll Verification Form has been is opened, depending on the type of EPV go to the following pages in this document for instructions:

New Retirement EPV      Pages 10-12

Survivor Benefit EPV      Pages 13-14

Refund EPV      Pages 15-16

# Section Three:

## Ending Payroll Verification Forms

# New Retirement EPV

## New Retirement Ending Payroll Verification Form

Fill out the following information in order to complete the pending request and verify the pre-filled information. Fields marked with asterisk(*) are required

- **You have 30 minutes to fill this form out, please use the save button to avoid losing work.**

**Member Information** ⓘ ← **Information Button is available for each section**

| SSN | 555-55-5555 |
|---|---|
| Full Name | Jones, Peter |
| Termination Date * | |
| Or | |
| Last Day of ASRS membership * | |
| Or | |
| Not Applicable * | ☐ |

**Member Information auto populates**

**Enter the termination date, typically the final date employee worked or was paid through.**

**If the employee did not terminate employment, use the last date of ASRS Membership, or the date the 20/20 criteria was not met.**

**Click** "Not applicable" if the employee did not terminate or change their employment to a status that is no longer eligible for active ASRS membership. Comments are required.

## Total Salary Paid ⓘ

Amount paid to member during their last fiscal year

| Total Salary Paid | |
|---|---|

**Total Salary paid in the last fiscal year, July 1 through termination date. May be a partial year total, depending on when the employee terminated.**

## Regular (Base) Compensation ⓘ

List the member's regular wages for the last three (3) payrolls and include any balance of contract, if applicable.

**\*Do not include termination payments in this section**

| Pay Period Ending Date (mm/dd/yyyy) | Gross | Retirement Contributions | |
|---|---|---|---|
| 04/01/2012 | $1,500 | $150 | Delete |

Add Row

**Click** to add rows

Enter the last three PPE, Gross wages on which ASRS contributions were withheld.

Do not include Employer contributions or LTD.

Regular base compensation does not include any amounts paid contingent upon termination of employment.

**Other Compensation** ⓘ

List all lump sum and periodic payments paid in the last five(5) years that were not regular wages or pay for performance. Identify the payment type (annual, sick, early retirement incentive, termination pay).
For detailed information on the payment types click on the following link

📄 Payment Types Document

**\*Do not include amounts withheld for Long Term Disability**

| Pay Period Ending Date (mm/dd/yyyy) | Gross | Payment Type | Retirement Contributions | |
|---|---|---|---|---|
| 05/23/2011 | $10,000 | Termination ▼ | $100 | Delete |

Add Row

Dropdown list:
- ---SELECT ONE---
- Indirect Benefits
- Leave Balance Purchase
- Longevity
- Military Differential
- Non-Accountable Reimbursements
- Non-Monetary Benefits
- On Call/Stand By
- Pay Withheld by Employee Election
- Pay Withheld by Requirements of Law
- Performance
- Retroactive
- Stability
- **Termination**
- Test payment type1
- Unidentifiable
- Voluntary Separation

> **Click** to view definitions of payment types.

> List all lump sum and periodic payments made in the last five years that were in addition to regular or base compensation.

> Enter appropriate PPE, Gross wages on which ASRS contributions were withheld and employee pension contributions.
>
> Do not include Employer contributions or LTD.

> Select the appropriate payment type.
>
> Go to payment types document to see definitions above.

**Notes and comments to ASRS** ⓘ

(Please limit the comments to a maximum of 10,000 characters)

10000 characters left

> Explanation required if "Not Applicable" is checked under member information.

**Employer Information and Certification of Authorized Employer Representative**

| Employer Name | University Of Arizona |
|---|---|
| ASRS Employer Number | 104120 |
| Asrs Phone Number | 555-555-5555 |
| Title | EPVM |
| Email Address | webadministrationtest@azasrs.gov |
| Employer User Name | Jones, Jennifer |

Verify employer information is current and valid.

☐ **Employer Certification**
- I certify that I am the employer user named above and my title and contact information is current and correct.

Save  Submit  Cancel

**Click** on Employer Certification, verifying you are the employer user

Button Definitions:

| | |
|---|---|
| **Save** | Saves changes and places the EPV back in the current list for additional entry. |
| **Submit** | Saves your changes and submits to ASRS for processing. The EPV is moved into the Historical list for future revisions if necessary. |
| **Cancel** | Cancel your changes and places the EPV back in the current list. |

# Survivor Benefit Ending Payroll Verification

**Survivor Benefit Ending Payroll Verification Form**

Fill out the following information in order to complete the pending request and verify the pre-filled information. Fields marked with asterisk(*) are required.

• You have 30 minutes to fill this form out, please use the SAVE button to avoid losing work.

**Member Information** ⓘ     ← **Information Button is available for each section**

| SSN | 555-55-5555 |
| Full Name | Jones, James |
| Date of Death | 03/01/2012 |
| Employee's Last Day Worked * | 4/13/2012 |
| Or | |
| Not Applicable * | ☐ |

Member Information and Date of Death auto populates

Enter last day employee worked.

In the event that the request was sent in error and employee has not died, then check the "Not Applicable" box.

**Regular (Base) Compensation** ⓘ

List the member's regular wages for the last three (3) payrolls and include any balance of contract, if applicable.

*Do not include termination payments in this section

| Pay Period Ending Date (mm/dd/yyyy) | Gross | Retirement Contributions | |
|---|---|---|---|
| 04/30/2012 | $10,000 | $1,000 | Delete |

Add Row

**Click** to add rows

Enter the last three PPE, Gross wages on which ASRS contributions were withheld.

Do not include Employer contributions or LTD.

Regular base compensation does not include any amounts paid contingent upon termination of employment.

**Other Compensation** ⓘ

List all lump sum and periodic payments paid in the last five(5) years that were not regular wages or pay for performance. Identify the payment type (annual, sick, early retirement incentive, termination pay). For detailed information on the payment types click on the following link
📄 Payment Types Document

*Do not include amounts withheld for Long Term Disability

| Pay Period Ending Date (mm/dd/yyyy) | Gross | Payment Type | Retirement Contributions | |
|---|---|---|---|---|
| | | ---SELECT ONE--- ▼ | | Delete |
| | | ---SELECT ONE--- | | Delete |
| | | Indirect Benefits | | Delete |
| | | Leave Balance Purchase | | Delete |
| | | Longevity | | Delete |
| | | Military Differential | | |

Non-Accountable Reimbursements
Non-Monetary Benefits
On Call/Stand By
Pay Withheld by Employee Election
Pay Withheld by Requirements of Law
Performance
Retroactive
Stability
Termination
Test payment type1
Unidentifiable
Voluntary Separation

Add Row

**Click** to view definitions of payment types.

List all lump sum and periodic payments made in the last five years that were in addition to regular or base compensation.

Select the appropriate payment type.

Go to payment types document above for definitions.

## Notes and comments to ASRS ⓘ

> Explanation required if "Not Applicable" is checked under member information.

(Please limit the comments to a maximum of 10,000 characters)

`10000` characters left

## Employer Information and Certification of Authorized Employer Representative

| Employer Name | University Of Arizona |
|---|---|
| ASRS Employer Number | 104120 |
| Asrs Phone Number | 555-555-5555 |
| Title | EPVM |
| Email Address | webadministrationtest@azasrs.gov |
| Employer User Name | Jones, Jennifer |

> Verify Auto Populated information is current and valid.

☐ **Employer Certification**
- I certify that I am the employer user named above and my title and contact information is current and correct.

> **Click** on Employer Certification, verifying you are the employer user

Save  Submit  Cancel

Button Definitions:

| **Save** | Saves changes and places the EPV back in the current list for additional entry. |
|---|---|
| **Submit** | Saves your changes and submits to ASRS for processing. The EPV is moved into the Historical list for future revisions if necessary |
| **Cancel** | Cancel your changes and places the EPV back in the current list. |

# Refund Ending Payroll Verification

## Refund Ending Payroll Verification Form

Fill out the following information in order to complete the pending request and verify the pre-filled information. Fields marked with asterisk(*) are required

- **You have 30 minutes to fill this form out, please use the save button to avoid losing work.**

**Member Information** ⓘ ← Information Button is available for each section

| | |
|---|---|
| SSN | 123256789 |
| Full Name | Paul Smith |
| Termination Date * | 4/5/2013 |
| Or | |
| Not Applicable * | ☐ |

If the employee did not terminate employment, then click the "Not Applicable" box.

Comments are required if this option is selected.

Member Information auto populates

Verify the termination date, typically the final day on which employee worked or was paid through.

Termination of employment is required to forfeit and refund contributions.

## Final Contributions, Adjustments, or Corrections ⓘ

Amount of Final Contributions, Adjustments, or Corrections (not including LTD Contributions)

| | |
|---|---|
| Final Pay Period Ending Date for Final Contributions, Adjustments, or Corrections | 4/19/2013 |
| Final Contributions, Adjustments, or Corrections | $99,999 |

**Notes and comments to ASRS** ⓘ

(Please limit the comments to a maximum of 10,000 characters)

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This is in lieu of or in addition to the termination date.

Enter the terminated employee's final contribution

Explanation required if "Not Applicable" is selected under member information.

**Employer Information and Certification of Authorized Employer Representative**

| Employer Name | University Of Arizona |
|---|---|
| ASRS Employer Number | 104120 |
| Asrs Phone Number | 555-555-5555 |
| Title | EPVM |
| Email Address | webadministrationtest@azasrs.gov |
| Employer User Name | Jones, Jennifer |

Verify Auto Populated information is current and valid.

☐ **Employer Certification**
• I certify that I am the employer user named above and my title and contact information is current and correct.

Click on Employer Certification, verifying you are the employer user

Save   Submit   Cancel

Button Definitions:

| | |
|---|---|
| **Save** | Saves changes and places the EPV back in the current list for additional entry. |
| **Submit** | Saves your changes and submits to ASRS for processing. The EPV is moved into the Historical list for future revisions if necessary |
| **Cancel** | Cancel your changes and places the EPV back in the current list. |